

Procurement Other P-Card and Expenses

Approve Travel Authorization

Once an employee submits a Travel Authorization, the transaction is routed with email notifications to the employee's Supervisor for approval and then two levels of Department Level approvers.

Supervisors ensure that the travel meets a specified business purpose. Department Approvers ensure budget is available for the anticipated travel.

Step	Action
1.	 Enter <u>https://home.cunyfirst.cuny.edu</u> in your browser's address bar: Enter your Username and Password and click the Log In button. From the Enterprise Menu, select the Financials Supply Chain link.
2.	On the Universal Navigation Header, click the Worklist link. Note: Alternatively, navigate to: <u>Manager Self-Service > Travel and Expense</u> <u>Center > Approvals > Approve Transactions.</u> The Manager Self-Service navigation also provides approvers with another option to approve Travel Authorizations. The Manager Self-Service navigation displays all Travel Authorization transactions available for approval, and offers additional tabs and filters.
3.	In the Worklist section Link column, select the link for the Travel Authorization you wish to review for approval.
4.	The Travel Authorization Summary page displays. At the bottom of the page beneath the Comments section, the Budget Status must be Valid for the Approval button to display. <i>Note: The Budget Check batch process is run hourly weekdays. If the Budget</i> <i>Check status is 'Not Chk'd', then either return to the approval item in an hour or</i> <i>run a manual budget check.</i>
	 Note: To manually run the budget check: 1. Click the Budget Options link. 2. The Commitment Control Page displays. Click the Budget Check button. When there is sufficient budget, then the Budget Checking Header Status field displays 'Valid Budget Check'. 3. Click the OK button.



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5.	Approve Travel Au	uthorization]
	Travel Authorization Summary											
	Belen Buenviaje User Defaults Authorization ID: 000000216											
	General Information											
	Description:	Meeting in Albany	NY		Con	nment:	See attachme	nts:				
	Business Purpose:	Meeting					Meeting invitat Amtrak estima	ion Ited fare				
	Status:	Submitted for App	roval									
	*Date From:	06/16/2014		To: 06/17	7/2014 Las	t Updated:	06/16/2014	By: 1	1199998			
		Attachments (2	<u>2)</u>									
	Accounting Defaults				Mc	ore Options:				GO		
	You can deny individu	Accounting Detauns More Options:										
	Details								Custo	omize Find r	a	
	Expense Type	Date	PC	Project	Activity	Amou	nt Currency	A	pprove			
	Non PSC Train Ticket	06/16/2014	BU			158.0						
	Non PSC Taxi/Car	06/16/2014				50.0						
	Service Non PSC Taxi/Car	00/10/2014				50.0						
	Service	06/17/2014				50.0	JU USD		V			
	Totals											
	Total:					258.00 L	JSD					
	Less Non-Appro	oved:				0.00 L	JSD					
	Total Authorized	Total Authorized: 258.00 USD										
	In the General	Informatio	n s	ection a	an ident	ifying D)escripti	on a	nd the	e Busir	ness	
	Purpose displa	ay followed	by 1	the curr	ent Sta	tus and	d the trav	/el da	ates.			
6.	Click the Attac	hments lin	k to	view th	e supp	orting d	ocumen	tation	۱.			
_						5						
	Note: The nu	mber on th	e li	nk indi	cates tl	he num	ber of a	nttach	hmen	ts.		
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8.	The attachmen	it displays i	n a	new wir	ndow. A	After vie	ewing the	e atta	chme	nt, clicl	k the	×
	Close button in the upper right corner of the window.											
9.	Click the OK button.											
10.	The Travel Au	thorization	n pa	ae disp	lavs. C	lick the	Accour	ntina	Defa	ults lin	k to v	view
_	the Departmen	t Budget fo	r the	e entire	Travel	Authori	zation.	As ne	eded	. modif	v the	-
	ChartFields an	d click the (DK	button.						,	,	
	Note: If the A	ccounting	Def	fault Ch	nartFiel	ds are	modifie	d, the	en ru	n a ma	nual	1
	Budget Check	. Ο										
11	The Travel Au	thorization	na	ae disn	lavs In	the De	tails se	ction	Fyne	nse Tv	ne	
	column select	the link of a	a lin	e to rev	iew			011011	Слро	noe ry	ρc	
10						P I						9. 1
12.	The Authoriza	tion Detail	pa	ge for th	at line o	displays	s. Click	the A	ccou	nting I	Deta	i l link
	to view the Cha	art-ields foi	' this	s expen	se line.							
13.	On the Accourt	nting Detai	l pa	ge, as i	needed	, modify	y the Cha	artFie	elds ai	nd click	the	OK
	button.											
	Note: If any Accounting Detail ChartFields are modified, then run a manual											
	Budget Check	ſ.										
14.	Click the OK b	utton.										



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15.	Click the Return to Travel Authorization Details link.
16.	The Travel Authorization page displays. As needed, in the Comments section, enter free form text.
	Note: Comments are required when a Travel Authorization is sent back by an approver. The employee or their proxy may modify the Travel Authorization and re-submit it for approval.
17.	Click either the Approve or Send Back buttons.
	Note: Both the Expense User and, if applicable, the proxy that submitted the Expense Report on behalf of the Expense User are notified when the Expense Report is sent back for modification.
18.	The Submit Confirmation page displays. To confirm that the Travel Authorization is approved at your level, click the OK button.
	End of Procedure.